A funded health reimbursement arrangement (HRA) for Washington State employees in general government agencies and higher education institutions

Enrollment/Status Change Instructions

Congratulations! You're about to electronically enroll or submit participant status changes for your employees/retirees. No chasing down or filling out paper forms!

This process works great if you:

- Are enrolling one or more employees/retirees; or
- Need to provide multiple participant status changes (retiree-rehire dates, separation dates, etc).

With our Enrollment/Status Change Spreadsheet template, all you have to do is populate, save, and upload. It's that easy!

Please take a couple minutes to read the quick tips and information.

Ask Questions
1-888-828-4953

More Information
veba.org

If you have just a few employees/retirees to enroll, you can quickly enter their information directly into our system. Log in to your online employer portal and click **Participants**. Click the **Enter Participant Information** button and follow the prompts.

Enrollment • Quick Tips

1. **Use our Enrollment/Status Change Spreadsheet template for secure upload.** It's a simple Excel Workbook you can download from your online employer portal. To get the most current version, log in at **veba.org** and click **Resources**.

2. **Enroll all eligible employees/ retirees no more than 60 to 90 days before making contributions.** Upload your Enrollment/Status Change Spreadsheets before processing VEBA MEP deductions in your HRMS. This will help us get your enrollment data processed and new participant accounts set up before receiving your contribution data.

3. **Make sure all data is accurate (names, SSNs, birthdates, etc.).** If copying and pasting data from another file, make sure the data remains aligned with the right employees. Submitting incorrect or misaligned data often results in administrative errors that are difficult to fix.

4. **Avoid upload errors.** Don't change tab names, column titles, or preset cell formatting. If pasting data copied from another file, use the **Paste Special** function and select **Values** (V) only. This will paste only the copied data (values) without changing the preset cell formats. Delete any blank rows. Don't use password protection.

5. **Submitting spouse and dependent data is not required**. Participants provide this information after logging in online or when submitting claims.

6. **The default investment allocation is 100% Conservative Portfolio**. Participants can update their investment allocation once per calendar month.

7. **We'll notify your new participants**. If your Enrollment/Status Change Spreadsheet includes email addresses, we'll immediately email enrollment notices to your new participants. These notices will include instructions to register online and check and update contact information, investment allocation, covered family members, and account preferences. We'll also mail paper welcome packets to enrolled participants after posting their contribution. Welcome packets will contain the participant's account number, investment allocation, coverage information, instructions for submitting claims, and a Plan Summary.

If you have just a few participant status changes to submit, you can quickly enter them directly into our system. Log in to your online employer portal and click **Participants**. Click the **Process Participant Status Change** button and follow the prompts.

Participant status changes can include **address changes, retiree-rehire reporting,** and **separation date reporting** for retiree-rehires.

Participant Status Changes • Quick Tips

1. **Use our Enrollment/Status Change Spreadsheet template for secure upload.** It's a simple Excel Workbook you can download from your online employer portal. To get the current version, log in at **veba.org** and click **Resources**.

2. **Report separation dates for retiree-rehires on the StatusChangeData tab of the file.** Separation date reporting for a retiree-rehire is considered a participant status change. Retiree-rehire reporting is required so we can place the participant's HRA in a limited status. Only certain "excepted" medical expenses are eligible for reimbursement during re-employment. Generally, this includes dental, orthodontia, vision, and long-term care.

3. **SSN or ParticipantNumber is always required, but certain other fields might not be.** For example, if updating updating addresses, don't populate anything after Column G. When submitting other status changes, such as retiree-rehire dates or death of participant, populate Columns H and J, but leave Columns I and K through O blank.

4. **Avoid upload errors.** Don't change tab names, column titles, or preset cell formatting. If pasting data copied from another file, use the Paste Special function and select Values (V) only. This will paste only the copied data (values) without changing the preset cell formats. Delete any blank rows. Don't use password protection.

Step 1: POPULATE

Our **Enrollment/Status Change Spreadsheet** template has five tabs: Instructions, EmployerInfo, EnrollmentData, StatusChangeInstructions, and StatusChangeData.

- ☐ Enter all information requested in the EmployerInfo tab, including your Employer ID Number. Your Employer ID Number **i**s assigned by us and is available upon request from our Customer Care Center**.**

- ☐ Populate the EnrollmentData and StatusChangeData Tabs as applicable. If copying and pasting data from another file, be sure to use the **Paste Special** function and select **Values** (V) only. This will paste only the copied data (values) without changing the original cell formats in the template. The file will become disabled if you change the original cell formats.

ENROLLMENTS: The following **enrollment** data is required for each employee:

- SSN
- FirstName
- LastName
- DOB
- Address1
- City
- State
- ZIP
- Phone
- Separation Date

STATUS CHANGES: The following **participant status change** data is required for each participant:

- SSN or ParticipantNumber
- EventType *(if applicable)*
- EventDate *(if EventType is populated)*

In addition, the following data is required for address updates:

- Address1
- Address2 *(if applicable)*
- City
- State
- ZIP

For detailed information about each field, see **Data Validations & Formatting Requirements** in the **EnrollmentInstructions or StatusChangeInstructions**.

Step 2: SAVE

☐ Save your Enrollment/Status Change Spreadsheet as an Excel Workbook (.xlsx). Include your Employer ID Number in the file name.

Step 3: UPLOAD

☐ Upload your Enrollment/Status Change Spreadsheet. Log in to your online employer portal and click **Participants**. Click the **Upload Enrollment/Status Change Spreadsheet** button and follow the prompts. If there's a problem, you'll get a message with further instructions**.**

What's Next?

We'll email enrollment notices to your new participants if you provided us with their email addresses. These notices will contain a brief description of the VEBA MEP benefit, along with a temporary online registration link. After logging in, participants can check and update their contact information, account preferences, covered individuals, and investment allocations.

After receiving your contribution for new participants, we'll mail them paper welcome packets. Welcome packets will contain participant account numbers, online registration instructions, investment allocations, coverage information, instructions for submitting claims, and a Plan Summary.

We look forward to providing you and your participants with great service!

Ask Questions
1-888-828-4953

More Information
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IMPORTANT NOTE: It is your responsibility as the Employer to ensure all information submitted to the Plan is correct. The Plan and its agents may rely upon any data or information submitted from a Participant or Employer to be true and correct. The Plan and its agents are not responsible for any errors made by an Employer with regard to the data or information submitted to the Plan, nor are the Plan and its agents responsible for further errors that result from incorrect data or information submitted by an Employer. If an Employer discovers that incorrect information or data has been submitted to the Plan, the Employer should contact the Plan in writing to correct the inaccurate information or data.

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